

## **IMAC Training and Technical Assistance Meeting Minutes – August 17, 2004**

Present: Tricia Bless, Eric Gibson, Kevin Raines, Vicki Jessup, Deb Solis, Pam Lohaus, Dave Hippler, Jenny Hoffman, Russell Yancey, Staci Wanty, Theresa Fosbinder, Margaret Romens, Jeff Brikowski, Melissa Otter, Julie Loebel

### **Current Distance Learning Initiatives**

#### **Update and Feedback:**

**EVP** – There will be a big push over the next three weeks in Milwaukee to get workers trained. State and county training resources will be deployed to get everyone trained.

#### **Plans to brief IMAC (Theresa/Tricia)**

Theresa Fosbinder will be giving a training update to the big IMAC on 8/19. The topics to be covered include:

- CARES Worker Web;
- Training and Technical Subcommittee progress
- A status report on the Reduced Change Reporting phase 2b mandatory training.

Deb Solis will check if she can be with Theresa as a county representative for this update to IMAC.

*(Followup – Margaret Romens was the county TATA representative at the IMAC meeting)*

Theresa distributed a draft activities report for the group's approval on the direction and activity of this subcommittee, which will go to IMAC (*attachment 1*). In addition, she will distribute a report of online course data (*attachment 2*). The group discussed why the numbers for completion on RCR IIB have been low. Theresa will ask for feedback from the IMAC on how to we reach counties who are not represented in this group as to why the numbers are so low. There will be a report going out to all counties and Area Coordinators the week of 8/23 with the status of those enrolled, including names of both completions and non-completions. Theresa will be talking to management about the consequences (if any) of a worker not completing a mandatory training course. This group will also begin discussing this same topic next month. Russell Yancey provided an update of Milwaukee County's training requirements; management is requiring all their workers to take training, even if it's not mandatory.

#### **PTS Learning Center profile update – (Eric)**

Eric Gibson explained the reason for updating the profile. The initial deadline for completing the profile was 7/30, however the survey will be left up and available for those that haven't but want to update. There's currently a team going through and merging the data, this should be done by mid-September. The data will show the workers that have updated their profile and also those that have been in the learning center at least one time but haven't updated their profile. The counties that didn't have a high response rate will be notified and asked to complete the profile. There were 81 agencies with two or less responses and of those, 29 agencies had zero updates and will be followed up with first.

Based on this and other recent discussions, Theresa asked if workers may think that the emails sent from PTS Learning Center or PTS training staff may be spam or if agencies have filters that may not be letting the emails through. Dave Hippler monitors various other list serves and has found that most times in these situations the mailboxes are full and that's why they come back. Margaret Romens suggested starting out the message with "DHFS", and then workers would know it's not spam. The email regarding the profile updates were sent out from PTS so workers may not have recognized whom it was coming from. Because the contracted training staff doesn't all have DHFS addresses, the PTS staff is investigating the possibilities of a generic mailbox titled IM Training so anyone from training can send out an email and it should be recognized as coming from training.

#### **Electronic Case File Update – (Eric)**

*(Attachment 3)* Eric gave background information on what's been done so far. ECF is an electronic version of the paper case file. The ECF initiative will not create new policy but only the process of how verification is collected and stored. Many of the specifics on how documents get scanned, etc. will be decided based on county input and pilot experience. There will be communications going out to the pilot counties. Based

on recommendations from the pilots there may be “best practices” sent out, however the state is anticipating that counties will still come up with some of their own unique processes based on their needs. The state will come up with standards for what must be scanned. The hope is that ECF will make for a more standard and efficient filing system.

Questions noted by Eric to take back to the ECF planning group:

- What happens if one document could be used for more than one type of verification?
- If completed forms are emailed to them would the worker have to print and then scan it in or can the form just be imported in?
- Dane County also has Eldercare scan in the signature page into their system, Deb is asking if that can also be emailed and then imported into ECF?

It's expected that the vendor will train on the hardware and software and Partner Training Services will train on procedure and navigation at the worker level for the counties rolling out in 2005. The vendor will train everything for the pilots.

#### **Wisline Web Opportunity Update – (Tricia)**

Tricia Bless reported that the 8/23 & 8/26 quarterly training update sessions are being held next week. We need to do some talking and planning about why people are not taking advantage of these opportunities, and why certain agencies have never signed up for any of these events. It was suggested to call the counties that haven't signed up and encourage them to participate, as this is our vehicle for communication.

#### **CWW training plan – (Theresa/Jeff)**

(Attachment 4) Melissa Otter, System Analyst and assigned to CWW, was present for this agenda item. Based on TATA input today, Theresa will present the CWW training model and strategy to IMAC for the feedback.

**Changes to the document** for IMAC include:

- Page 3, removing the number (4) as this will be ongoing.
- Pages 6&7, add the assumption that not every worker will take every module based on job function (i.e. clerical worker) so therefore it may be better to break up the assessment piece after every module verses one large assessment at the end (also see discussion below).
- Page 8, the 4<sup>th</sup> bullet, will be changed to “Based on resources, the availability to state training staff...”. The 5<sup>th</sup> bullet will be just one sentence eliminating the words in parentheses. The 6<sup>th</sup> bullet will say “The ability to investigate the format process”.
- There was nothing more to this document that the group thought should be added.
- The timeline should be put at the end of the document.

#### **Discussion on the model:**

- There are overlapping dates from the review labs past the implementation dates. Dave is on the implementation workgroup and reported that they will begin meeting on a weekly basis due to many issues and that this timeline will be changing.
- The group discussed the added assumption of breaking up the assessment piece vs. testing a worker at completion of their training to see if he/she is able to do an intake, person add, etc. on the CWW. We know there will be different paths that workers will take depending on their job function. There is an assessment workgroup that that will be proposing their plan to this group next month.
- The model is requesting a training conference, which management is willing to consider.
- After thorough review, Theresa asked if this group is in support of the training model? TATA is in support so Theresa will be taking it to the IMAC.

#### ***Update - feedback from the IMAC meeting (from email sent by Theresa on 8/25/04)***

*Hello TATA team!*

*Margaret Romans from Dane County was kind enough to be there as the county rep, and we also had Tricia Bless, Jeff Esterholm and Julie Loebel there from the PTS training team, and Gerry Mayhew and Amy Mendel Clemens from the PTS management team.*

*Our training topics overall were well received - I promoted the WisLine web quarterly updates, updated them on the PTS learning center worker profile survey, talked to them about participation in the distance learning courses so far, and went over the CWW proposed training plan. We were on the agenda for 60 minutes and I think that by the time it was all over, we actually talked about training for nearly 90 minutes! At the next TATA meeting, Tricia can talk to you about what was discussed about participation distance learning - there was some interesting conversation about what it means when training is mandatory and stuff like that.*

*What I really wanted you to know for now, is the result of the CWW training plan conversation.*

*Long story short:*

- We are OK to go ahead with our distance based model*
- Reaction to the guesstimate of 15-25 hours for the core modules was mixed - some groaned, others compared it to CARES training which was 5 days, and were glad it was less than that. We told them that we have more work to do to figure this out, but no one seemed TOTALLY put off by that estimate, so I think we are in a good ballpark.*
- The sticking point, as you might expect - was the assessment. The CWW assessment was discussed as having the potential to set a precedent for competency based training, and agencies wanted some time think about what that might mean in terms of local union/labor issues, contract, hiring processes, etc. Most did not appear to be opposed to the assessment concept overall, it was the direct link to getting the production ID that seemed to be of some concern.*

*So what we decided was that this will be discussed again at the next IMAC (September 16) . In the meantime, the training team will continue working on an assessment - it is just that we don't know for sure what will happen to those who don't pass. it may be that the assessment results are linked to the ID, it may be that they just serve as a point of information for the agency who then decides how to handle the situation, or there may be other things that we come up with that are the outcome of the results of the assessment.*

*So I think we did what we needed to do - we can get people started working on curriculum design, and will just have to stay flexible as far as what happens with the assessment.*

*Thanks to you all for your help with this!*

#### **Update of FS Big Ten (added agenda item)**

Jenny Hoffman – got a lot out of the keynote speaker Petra Marquart. She talked on how to be recognized and known for all the good that counties are doing in the light of funding decreases. Jenny felt very reenergized from the conference and in turn is reenergizing her staff in regard to error reduction, etc.

Russell Yancey– attended the session on Utah's paperless case file. Reviews are one-page forms that they sign and the rest of the review is done over the phone. They have a slick electronic system, which reads other of their state systems making for worker reduction. There were big counties in other states that have zero % error reduction.

Margaret Romens– Utah had combined manuals, which was quite impressive. She also got a hard copy of "tool box for teams" which she plans on using.

#### **NEXT MEETING:**

Tricia Bless will be facilitating the next meeting on 9/21 at FenOak.



# **IMAC TRAINING AND TECHNICAL ASSISTANCE (TATA) SUBCOMMITTEE ACTIVITIES REPORT AND IMAC ISSUES AUGUST 19, 2004**



## **2004 MEMBERSHIP**

Keli Pope	Kenosha County
Vicki Jessup	BHCE – Quality Assurance
Vanessa Robertson	Milwaukee County
Deb Solis	Dane County
*Jenny Hoffman	Brown County
*Russell Yancey	Milwaukee County
Jeff Brikowski	BHCE – Food Stamp policy section
Pam Lohaus	DHFS/Regional Office
Stacia Jankowski	BHCE - Outreach
Dave Hippler	BHCE - Communications
Melissa Otter	BHCE – Systems
Lynda Fischer	DWD/ DWD-DHFS Partner Training Services (PTS)
Staci Wanty	UWO-CCDET/DWD-DHFS Partner Training Services (PTS)
Judy Johnson	UWO – CCDET/PAC
Margaret Romens	Dane County
Kevin Raines	Waukesha County/ DWD-DHFS Partner Training Services (PTS)
Julie Loebel	ACS/DWD-DHFS Partner Training Services (PTS)
Tricia Bless	UWO-CCDET/DWD-DHFS Partner Training Services (PTS)
*Theresa Fosbinder	BHCE/DWD-DHFS Partner Training Services (PTS)
* Co-chairs	

## **CHARTER** IMAC TRAINING AND TECHNICAL ASSISTANCE SUBCOMMITTEE

This subcommittee was created in 2003 to impact all aspects of training and technical assistance services to local agencies and their workforce according to individual needs to achieve better program integrity and customer service.

## **2004 ACTIVITIES: APRIL - AUGUST**

MEETING DATE	MEETING TOPIC	ACTIVITIES
April 2004	No meeting	
May 2004	Distance learning, CARES Worker Web	Received IM training updates, continued discussion of mandatory training issue paper, provided feedback on current distance learning initiatives, participated in a presentation on the CARES Worker Web by Jim Jones, conducted an initial review of the CARES Worker Web training plan.
June 2004	No meeting	
July 2004	Distance learning, CARES Worker Web training plan	Discussed PTS Learning Center worker profile and reports and provided feedback, reviewed progress and provided feedback on current distance learning initiatives, conducted a detailed review of CARES Worker Web training plan, made a decision to support CARES Worker Web training plan with included recommendations.
August 2004	CARES Worker Web training plan, Electronic Case File	Received update on Electronic Case File project, continued review of CARES Worker Web training plan, created CARES Worker Web training plan support paper for IMAC review.

## **TOPICS TO SHARE AT AUGUST 19 FULL IMAC MEETING**

- Quarterly Training Updates – August Wisline Web opportunity
- PTS Learning Center Learner Profile Update
- Participation/completion data for current online courses
- CARES Worker web proposed training plan



## DHFS Online Course Data As of 8/16/04

### Food Stamp Reduced Change Reporting Phase IIA

Start date: February 2004

End date: Ongoing

Universe of workers: 1114 Food Stamp workers statewide

248 Milwaukee

866 balance of state

#### Milwaukee

Actual Number Enrolled	Percent of Worker Population	Actual Number Complete	Percent of Worker Population
42	17%	24	10%

#### Balance of State

Actual Number Enrolled	Percent of Worker Population	Actual Number Complete	Percent of Worker Population
689	79.5%	494	57%

## Food Stamp Reduced Change Reporting Phase IIB

Start date: June 2004

End date: September 30, 2004

***This course is mandatory for all workers who determine FS eligibility.***

Universe of workers: 1114 Food Stamp workers statewide

248 Milwaukee

866 balance of state

### Milwaukee

Actual Number Enrolled	Percent of Worker Population	Actual Number Complete	Percent of Worker Population
212	85%	198	80%

### Balance of State

Actual Number Enrolled	Percent of Worker Population	Actual Number Complete	Percent of Worker Population
772	89%	603	70%

- The end date for this course was recommended by IMAC at the May 2004 meeting.
- Agencies will be notified of current worker participation and completion of this mandatory course early in the week of August 23. This will allow more than a month to ensure that all appropriate staff complete this course by the September 30 deadline.
- Information about how to ensure that those who have completed the course get credit for completion will be included in the agency notification next week, as well as the Quarterly Training Update WisLine Web events on the August 23 and 26.

## Employer Verification Processing (EVP)

Start date: May 2004

End date: Ongoing

**Target audience for this is all FS/MA and W-2 workers statewide**

Universe of workers: 2500 Food Stamp/Medicaid/W-2 workers

800 Milwaukee (approximation)

1700 balance of state (approximation)

### Milwaukee

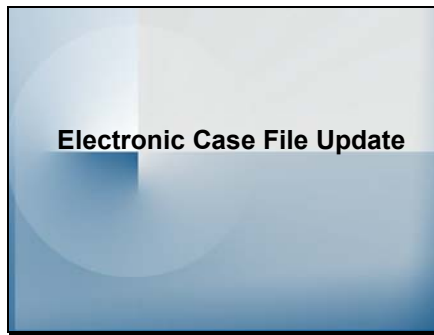
Actual Number Enrolled	Percent of Worker Population	Actual Number Complete	Percent of Worker Population
52	6.5%	35	4%

Note: Milwaukee is currently involved in facilitated learning events using the EVP distance based curriculum. Facilitation is being provided by teams of county and state trainers. It is expected that EVP training will be completed in Milwaukee by September 9, 2004.

### Balance of State

Actual Number Enrolled	Percent of Worker Population	Actual Number Complete	Percent of Worker Population
644	38%	530	31%

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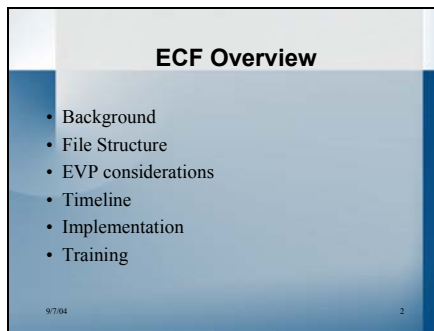
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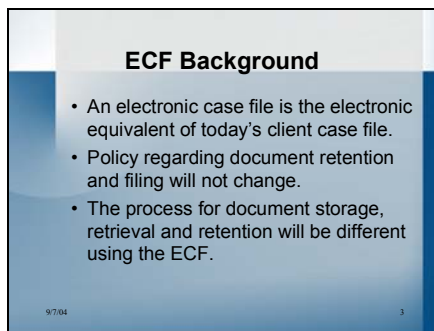
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Slide 3



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Slide 4

### ECF Background

The ECF will contain:

- Applications
- Assets
- Correspondence
- Fraud/Benefit Recovery
- Comments
- Verification of all types
- Miscellaneous/Office Specific

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Slide 5

### ECF Background

- Improve the Food Stamp error rate by ensuring all required documents can easily be found
- Clean-up and update case files to ensure they contain the appropriate and current information
- Improve upon and standardize case file content across locations
- Ease in sharing information across offices for things like QC and case transfers
- If implemented successfully, create an overall reduction in case error rates

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Slide 6

### ECF File Structure

Wisconsin DHFS Electronic Case File Structure Prototype

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graph TD
    CF[Case Folder] --> CI[Case Information]
    CF --> CHI[Case History Information]
    CF --> AI[Asset Information]
    CF --> INC[Income]
    CF --> EXP[Expenses]
    CF --> W2[W-2/FREE]
    CI --> MCS[Miscellaneous/Case Specific]
    CI --> AD[Associated Documents]
    CHI --> MCS
    CHI --> AD
    
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Slide 7

### EVP Considerations

- Connecting to ECF
- WAMS - State of Wisconsin's WAMS page:  
<https://on.wisconsin.gov>
- Passwords: When you are logging into ECF, if you suspend your password, your CARES User ID is also suspended.
- Printing from the ECF: Electronic files reduce the need for printing and keeping hard copy files.

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Slide 8

### Timeline

- Phase I (May 3, 2004):
  - Many of you should already be using a very rudimentary form of the ECF when you retrieve/view an EVF (Employer Verification Form) or IVF (Insurance Verification Form)

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Slide 9

### Timeline

- Phase II (Mid-September 2004) :
  - Pilot roll-out to 3 county agencies testing the "S, M, L, XL" approach to:
    - Document capture
    - Back file conversion
    - Document retrieval
    - Business process changes
    - Other, TBD

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Slide 10

### Timeline

- S, M, L, XL?
  - S = Locations with less than 2,500 cases
  - M = Locations with 2,500 – 5,000 cases\*
  - L = Locations with 5,000 – 20,000 cases\*
  - XL = Milwaukee\*
- Each of these “sized” partner locations will likely have a unique business and technology model to support their scanning and filing needs
  - \* 20 Locations represent approximately 80% of WI caseload

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Slide 11

### Implementation

- High Level Timeline
  - Workgroup kicked off in May to discuss the S, M, L and XL needs and related items
    - Clean hard copy folders
    - What to keep/what NOT to keep
    - Scanning capture and indexing process
  - Pilot September '04 – December '04
  - Tentative Roll-out starting January '04
  - Roll-out details are TBD

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Slide 12

### Training

- Components
  - Hardware and Software installation and configuration
  - Back File clean-up, conversion and indexing
  - Procedure
  - Access and Navigation

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### Contacts

<b><u>Implementation:</u></b> Bob Martin Project Manager State of Wisconsin Department of Health and Family Services DHFS Phone (608)-266-6740  DHFS E-mail: robert.martin@dhfs.state.wi.us	<b><u>Training:</u></b> Eric Gibson Distance Learning Partner Training Services DHFS/UW-O CCDET DHFS Phone (608)-264-6753  DHFS E-mail: Gibsoec@dhfs.state.wi.us
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Slide 1

PROPOSED CARES  
WORKER WEB TRAINING  
MODEL

August 19, 2004

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Slide 2

CARES WORKER WEB (CWW)  
TRAINING:  
OVERVIEW

- Planning for CARES Worker Web training is currently underway. Staff from DWD/DHFS Partner Training Services (PTS) is leading this effort, with input from the IMAC Training and Technical Assistance subcommittee and other stakeholders.
- Training planning and development includes both IM and WD training staff, and both IM and WD training needs are being considered.
- The proposed training model is a blend of various distance methodologies and facilitated learning experiences focused on local agency and tribal staff, primarily everyday CWW users – Client Registration, Income Maintenance, and W-2/TANF staff. Needs of other CARES stakeholders are being considered as a separate undertaking.
- Since the move from the Mainframe to CWW does not involve policy change, the training will focus exclusively on how to use this new tool.
- The training plan includes an assessment process to ensure understanding and ability to use the CARES Worker Web.

8/19/04

PROPOSED CARES WORKER WEB TRAINING MODEL

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Slide 3

CWW TRAINING COMPONENTS

1) PREREQUISITES

2) CORE MODULES

3) ASSESSMENT

TRAINING SUPPORT

- CWW Help
- Technical Assistance
- On-site support

8/19/04

PROPOSED CARES WORKER WEB TRAINING MODEL

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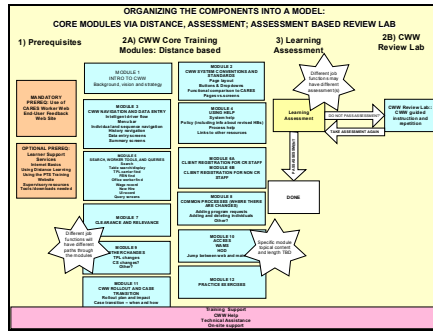
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## Slide 4



## Slide 5

**CWW TRAINING: ASSUMPTIONS**

- The CWW training package(s) will be mandatory for appropriate worker types.
- Core modules:
  - The core modules will be offered via distance using various technologies and tools best suited to the module's subject matter.
  - The model allows for different sequencing and number of core modules based on job function.
  - Work continues on refining the concepts presented in the core modules, the order in which they will be sequenced for various job functions, and how long they will take to complete. (It has been estimated so far that the core modules may take 15-25 hours to complete).

8/19/04 PROPOSED CARES WORKER WEB TRAINING MODEL 5

## Slide 6

**CWW TRAINING: ASSUMPTIONS**

- Assessment and Review Lab:
  - Successful completion of the assessment process will be required after completion of the core modules.
  - The assessment process will address core competencies/skills of the CWW. It is expected that if learners complete all the courses, they will pass the assessment process without a problem.
  - A passing score on the assessment(s) will constitute completion of the CWW training program and a CWW production ID will be issued.
  - Failure to successfully complete the assessment process will mean that CWW production access will not be granted and the trainee must attend a review lab session and complete the assessment process successfully after participation in the lab.
  - Consideration is being given to allowing learners who do not pass the assessment the first time the option of re-taking sections of the course OR taking the lab, and then re-taking the assessment.
  - The lab will consist of practice and repetition of concepts presented in the distance modules - it will not be an entirely separate course.

8/19/04 PROPOSED CARES WORKER WEB TRAINING MODEL 6

## Slide 7

**CWW TRAINING: ASSUMPTIONS, CONTINUED**

- **Training Support:**
  - There will be Train the Trainer events in the fall and winter that will include state trainers and local agency representatives (trainers and/or CARES coordinators and/or transfer coordinators).
  - We are exploring the possibility of establishing a "training call center" staffed with trainers to address customer needs with the distance approach on a real time basis.
- **New Worker:**
  - There will be a new worker hiatus based on the rollout schedule.
    - 2004 classes scheduled start 9/24/04 in Mosinee (ends 2/9/05) and 10/12/04 (ends 4/19/05) in Oshkosh
    - It is likely that a new worker class will start in a central location in January using the existing curriculum (will end approximately 04/05)
    - Instead of starting the next new worker class on the quarterly cycle (April), the next new worker class would start once curriculum revisions incorporating CWW are complete
    - The hiatus will allow agencies to focus on CWW training, and state trainers to focus on CWW curriculum revisions
    - If agencies have new hires that need new worker training between January and approximately July, they can work with PTS Training via Lynda Fischer to work out a plan. Agencies should plan to request independent training status for NWT during this period.

8/19/04 PROPOSED CARES WORKER WEB TRAINING MODEL 7

## Slide 8

**IMAC TRAINING AND TECHNICAL ASSISTANCE SUBCOMMITTEE SUPPORT OF CWW TRAINING MODEL**

The IMAC Training and Technical Assistance Subcommittee supports the CWW training plan with the following requests:

- Better communication to agency training staff about how to use distance delivery (including potential for a trainer's conference or series of training focused events this fall or winter, and increased marketing of the quarterly WisLine Web training update forums).
- The implementation of a training call center during the rollout of CWW training (and potentially to be used in the future for other distance initiatives) so that there is immediate support while training/learning.
- CWW Train the trainer events that include local agency training staff.
- Based on resources, availability of state training staff to provide on-site support/facilitation of distance learning pieces.
- Rollout "waves" be geographical in nature so that the labs can be held in close proximity to where workers are located.
- Investigation of various options for the assessment format.
- Continued opportunities to provide input for the CARES Worker Web training model and plans.

8/19/04 PROPOSED CARES WORKER WEB TRAINING MODEL 8

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**PROPOSED TRAINING TIMELINE**

WHO	PREREQS	DISTANCE MODULES	REVIEW LABS	IMPLEMENTATION DATE
Pilot 1	June 2004 – November 2004	December 1 – January 7, 2005	As needed/scheduled in January 2005*	January 21, 2005
Pilot 2	June 2004 – December 2004	January 1 – February 4, 2005	As needed/scheduled in February and/or March, April*	March 1, 2005
Rollout wave 1	June 2004 – February 2005	March 1 – April 29, 2005	April 18 – May 13, 2005*	May 1, 2005
Rollout wave 2	June 2004 – March 2005	April 1 – May 31, 2005	May 16 – June 10, 2005*	June 1, 2005
Rollout wave 3	June 2004 – April 2005	May 1 – June 30, 2005	June 13 – July 8, 2005*	July 1, 2005
Rollout wave 4	June 2004 – May 2005	June 1 – July 29, 2005	July 11 – August 5, 2005*	August 1, 2005
Rollout Milwaukee	TBD	TBD	TBD	TBD

\* Workers need to complete the assessment process prior to the end of the lab offerings for that wave.

8/19/04 PROPOSED CARES WORKER WEB TRAINING MODEL 9